On-Line Space Utilization Survey System

User's Manual Revised

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SECTION 1. OVERVIEW

In accordance with OMB Circular A-21, the Federal Government requires colleges and universities to conduct a space survey to support the calculation of the school's Facilities and Administrative rate, if their total direct costs from federal and federal flow through sponsored activity exceed $10 million dollars during the fiscal year.

The Research Foundation has created an On-Line Space Utilization Survey System to facilitate this process for those colleges of the City University of New York that are required to report on space information. This manual should be used as a guideline to help you utilize and navigate through the system.

SECTION 2. ACCESSING THE SYSTEM

To access the Space Utilization Survey System, visit the Research Foundation's website at http://www.rfcuny.org and "*Login*" in the area designated to the right of the screen for User Sign In (*see figure 1*).

Figure 1

Once you have successfully logged on to the RFCUNY website, select "E-Services" from the menu bar and then highlight "Space Utilization". You should now be in the On-Line Space Utilization System.

NOTE: In order to access the system, your user ID needs to have either *Grants Officer* level or *Assistant to Grants Officer* level access. To obtain the required level of access please call Grants and Contracts at (212) 417-8425.

SECTION 3. SURVEY FORMS

Many of the grants officers indicated that the process of completing space surveys historically has begun with the GO sitting down with each department chair, survey forms in hand, to discuss where their sponsored activity has occurred during the fiscal year. To assist you with this endeavor, we have designed a module within the system which is capable of printing blank space survey forms.

3. 1. Survey Form Options

There are three main options available for printing survey forms. They are:

1) all Departments – This option allows you to print, at one time, all of the departments of your college with Sponsored Activity who require a space survey. Departments are sorted in alphabetical order with there PIs following suit. Each PI survey is printed separately within a particular department. Projects are listed in numerical order.

2) per Department – This option allows you to print all of the PIs and their projects for a single department *only*. Choose this option if you wish to collect space utilization information for a single department.

3) per Principal Investigator – This option allows you to print all the projects for a single PI. Choose this option if you wish to gather space utilization information for a single PI.

3.2. Form Printing Formats

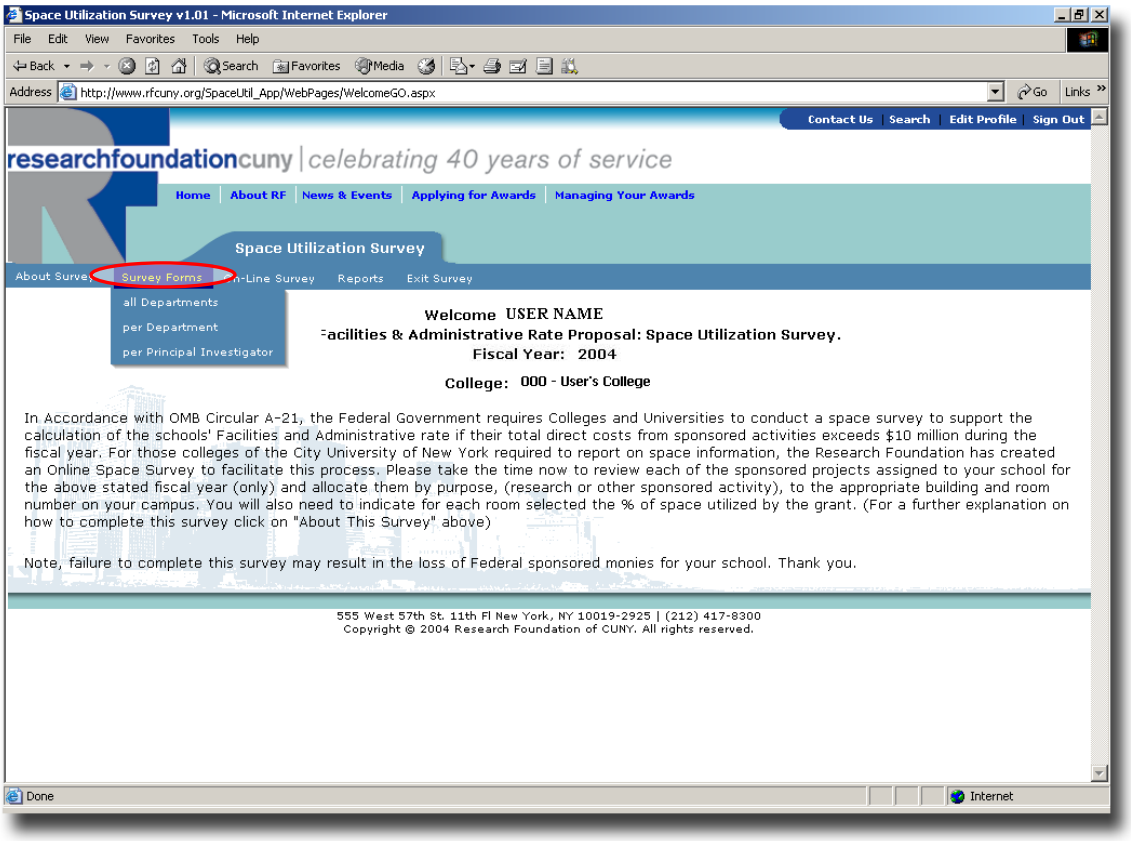
The system allows for the following options when printing forms and reports:

1) PDF (Pormenule Document Format) - default
2) DOC (MS Word Document)
3) HTML (4.0 complaint)
4) RTF (Rich Text Format)

Please note that you *do not* have to pick a print format; this an optional feature included in the system for your convenience. If you opt not to pick a print format, the system will default to print your forms and reports in PDF.

3.3. Printing Survey Forms

To print surveys place your cursor on the "Survey Forms" menu located on the main Space Utilization Survey screen (*see figure 2*).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Space Utilization Survey
About Survey | Survey Forms | On-Line Survey | Reports | Exit Survey
all Departments
per Department
per Principal Investigator
Welcome USER NAME
Facilities & Administrative Rate Proposal: Space Utilization Survey.
Fiscal Year: 2004
College: 000 - User's College
In Accordance with OMB Circular A-21, the Federal Government requires Colleges and Universities to conduct a space survey to support the calculation of the schools' Facilities and Administrative rate if their total direct costs from sponsored activities exceeds $10 million during the fiscal year. For those colleges of the City University of New York required to report on space information, the Research Foundation has created an Online Space Survey to facilitate this process. Please take the time now to review each of the sponsored projects assigned to your school for the above stated fiscal year (only) and allocate them by purpose, (research or other sponsored activity), to the appropriate building and room number on your campus. You will also need to indicate for each room selected the % of space utilized by the grant. (For a further explanation on how to complete this survey click on "About This Survey" above)
Note, failure to complete this survey may result in the loss of Federal sponsored monies for your school. Thank you.
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Done
Internet

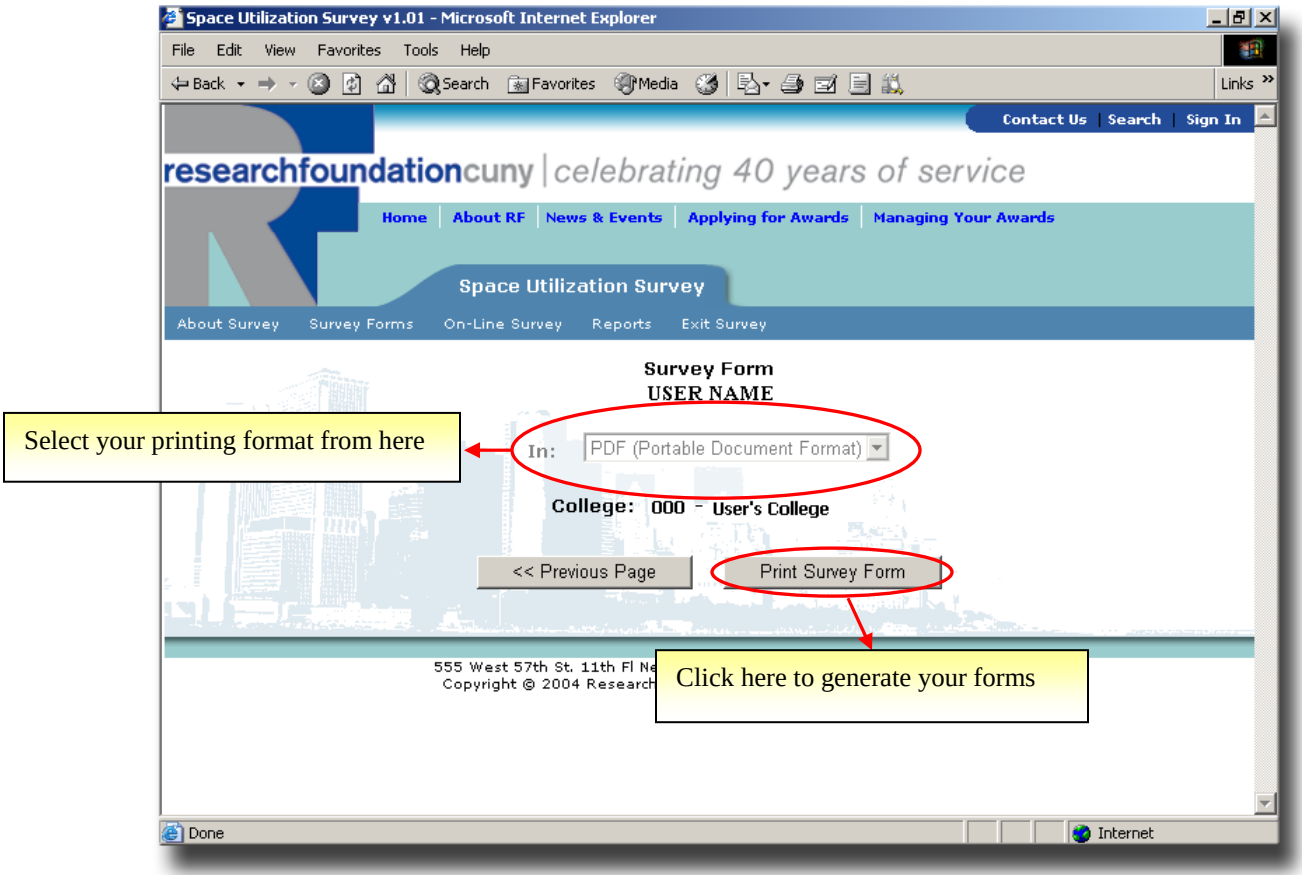
Figure 2

Select from the "Survey Forms" menu one of the three form options available.

1) Using the "all Departments" Option

If you wish to print surveys for "all Departments", click on this option from the "Survey Forms" menu.

This will bring you to the "Survey Form" screen. From this screen, select your desired print format (optional) and then click on the *"Print Survey Form"* button to generate survey forms (*see figure 3*).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Survey Form
USER NAME
In: PDF (Portable Document Format)
College: 000 - User's College
<< Previous Page
Print Survey Form
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Done
Internet
Select your printing format from here
Click here to generate your forms

Figure 3

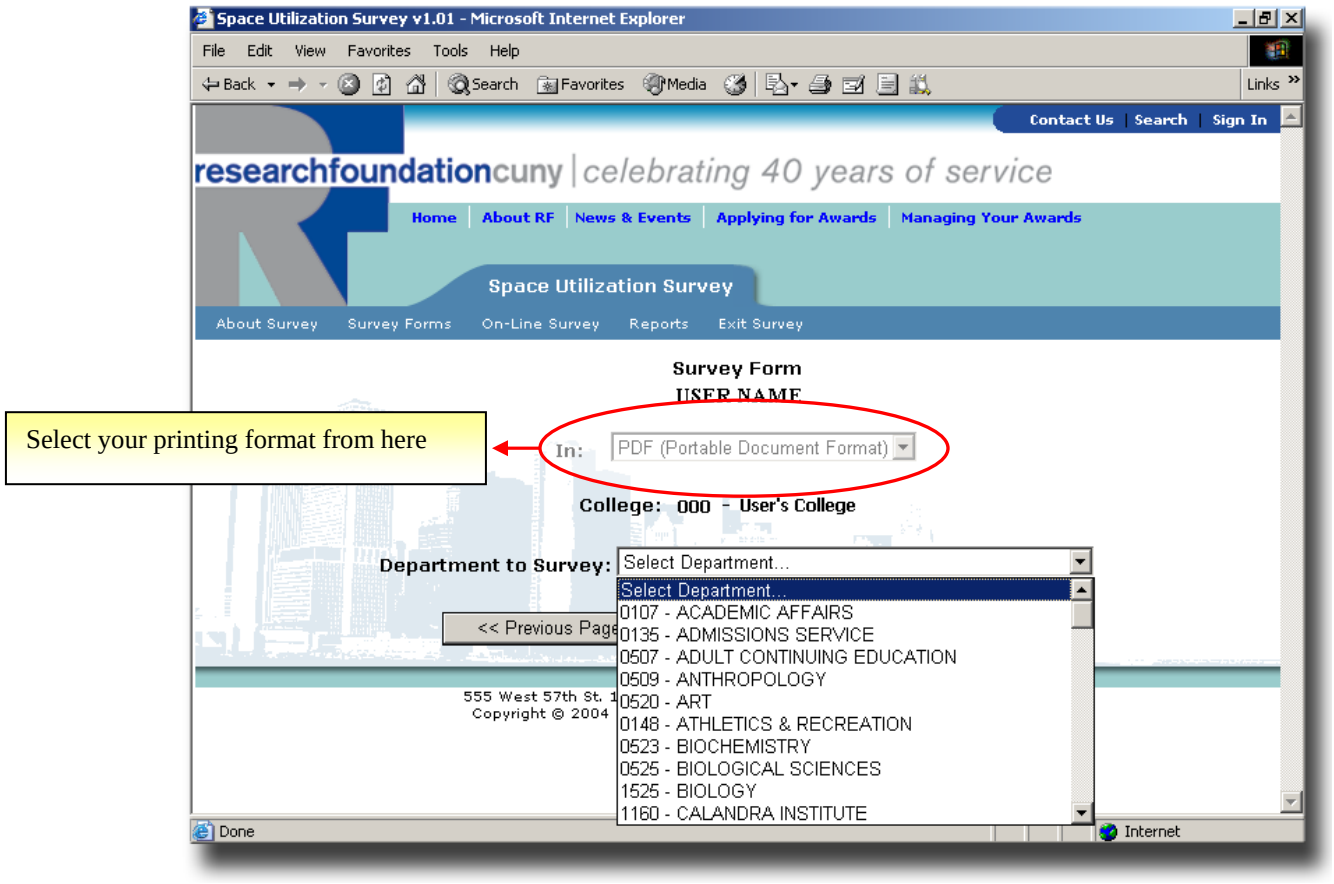
NOTE: If the system generates survey forms coded to a blank or incorrect department, please contact Varsha Joshi at the Research Foundation for help (Telephone: 212-417-8578).

2) Using the "per Department" Option

If you wish to print all of the PIs and their related PRSYs for a particular department, choose the "per Department" option under the "Survey Forms" menu.

This will bring you to the "Survey Form" screen. From this screen, select your desired print format (optional) and then select the department you wish from the "Department to Survey" drop-down box (*See figure 4*).

After you have made your selection, click on the *"Print Survey Form"* button to generate survey forms for the selected department.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About Survey | Survey Forms | On-Line Survey | Reports | Exit Survey
Survey Form
USER NAME
Select your printing format from here
In: PDF (Portable Document Format)
College: 000 - User's College
Department to Survey: Select Department...
Select Department...
0107 - ACADEMIC AFFAIRS
0135 - ADMISSIONS SERVICE
0507 - ADULT CONTINUING EDUCATION
0509 - ANTHROPOLOGY
0520 - ART
0148 - ATHLETICS & RECREATION
0523 - BIOCHEMISTRY
0525 - BIOLOGICAL SCIENCES
1525 - BIOLOGY
1160 - CALANDRA INSTITUTE
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Done
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Figure 4

Note: In order for a department to exist in the "Department to Survey" drop-down box, it must be coded to a project.

Note: If you are unable to find a project within a department, select " - " from the "Department to Survey" drop-down box.

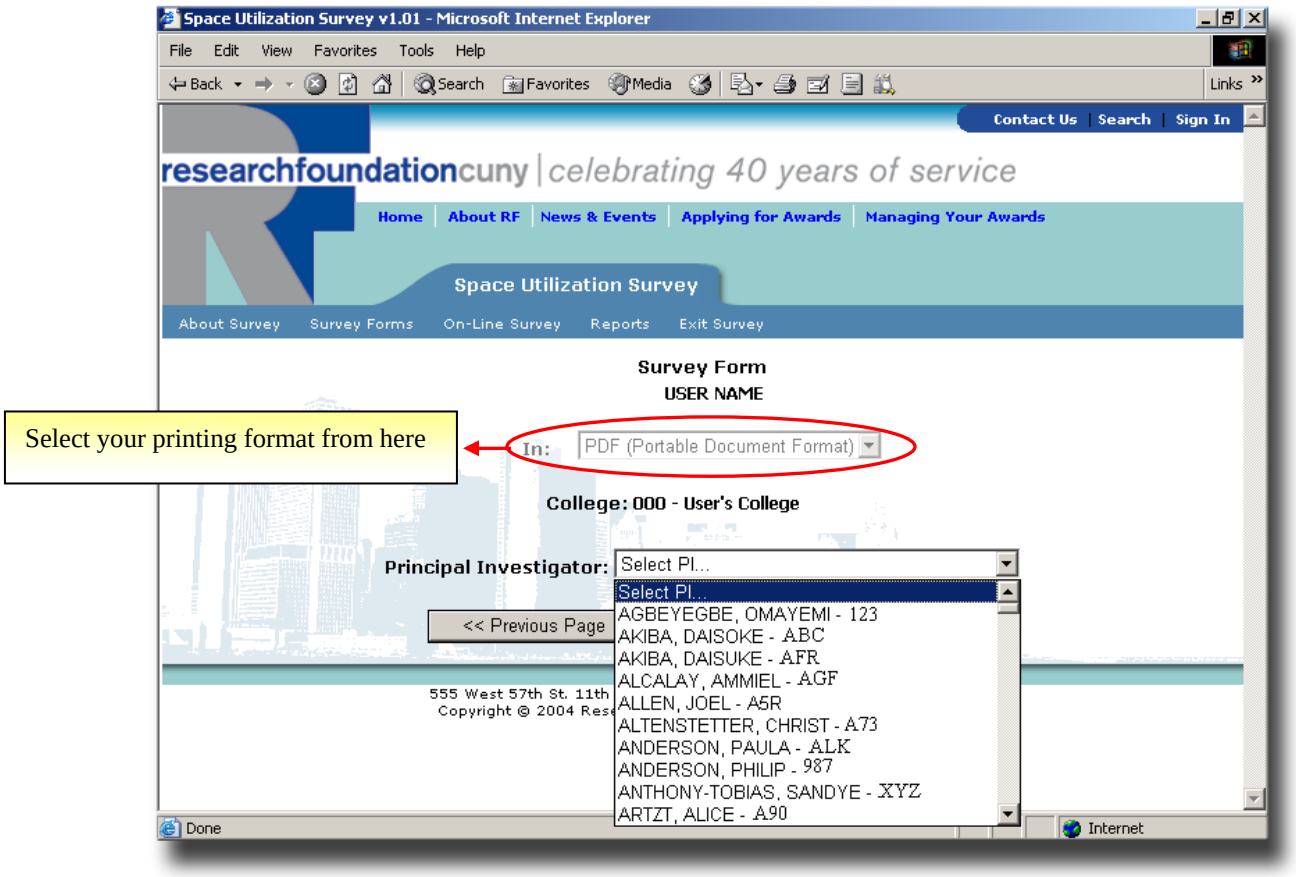
If you still do not see the project you wish to submit information for, please contact Varsha Joshi at the Research Foundation for help (Telephone: 212-417-8578).

3) Using the "per Principle Investigator" Option

If you only wish to print out projects for a particular PI, then choose the "per Principle Investigator" option from the **"**Survey Forms" menu.

This will bring you to the "Survey Form" screen. From this screen, select your desired print format (optional) and then select the PI you wish from the "Principal Investigator" drop-down box. The PI drop-down box lists all the PIs from your college in alphabetical order and includes their three-digit PI Code at the end of their name (*See figure 5*).

Make your selection from this list and then, click on the *"Print Survey Form"* button to generate survey forms for the selected department.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Survey Form
USER NAME
Select your printing format from here
In: PDF (Portable Document Format)
College: 000 - User's College
Principal Investigator: Select PI...
Select PI...
AGBEYEGBE, OMAYEMI - 123
AKIBA, DAISOKE - ABC
AKIBA, DAISUKE - AFR
ALCALAY, AMMIEL - AGF
ALLEN, JOEL - A5R
ALTENSTETTER, CHRIST - A73
ANDERSON, PAULA - ALK
ANDERSON, PHILIP - 987
ANTHONY-TOBIAS, SANDYE - XYZ
ARTZT, ALICE - A90
<< Previous Page
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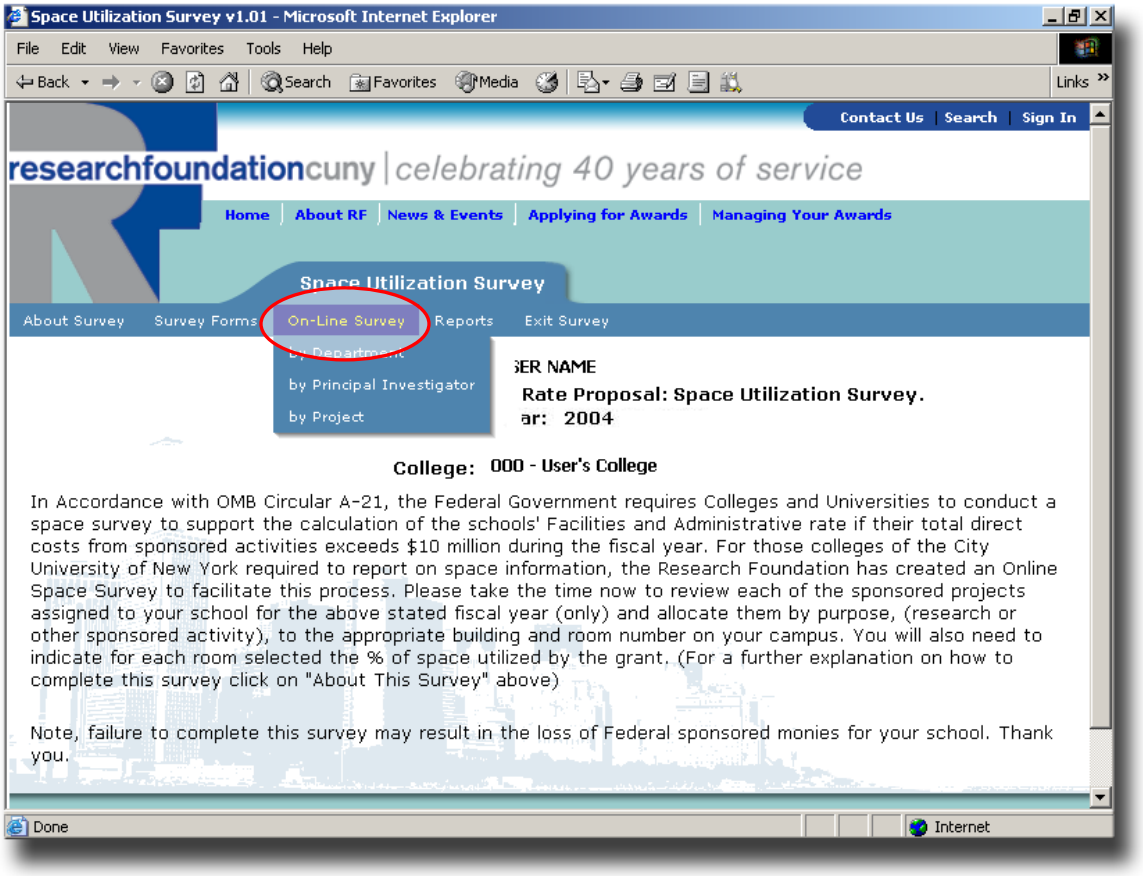
Done
Internet

Figure 5

SECTION 4. Inputting Space Data Online

After you obtain the space utilization data from the department chairs, you may choose to enter this information online by selecting one of the options from the "On-Line Survey" menu (*see figure 6*). This menu is activated by placing your curser over the title located on the menu bar.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by Principal Investigator
by Project
Rate Proposal: Space Utilization Survey.
College: 000 - User's College
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Note, failure to complete this survey may result in the loss of Federal sponsored monies for your school. Thank you.
Done
Internet

Figure 6

4.1. On-Line Survey Options

There are three choices available to enter space information on-line. They are:

1) by Department – Like the survey forms, this option sorts all your college's projects by department. Use this option if you wish to enter space information by PI for projects within a particular department.

2) by Principal Investigator – This option allows you to enter space utilization information for a particular PI's projects.

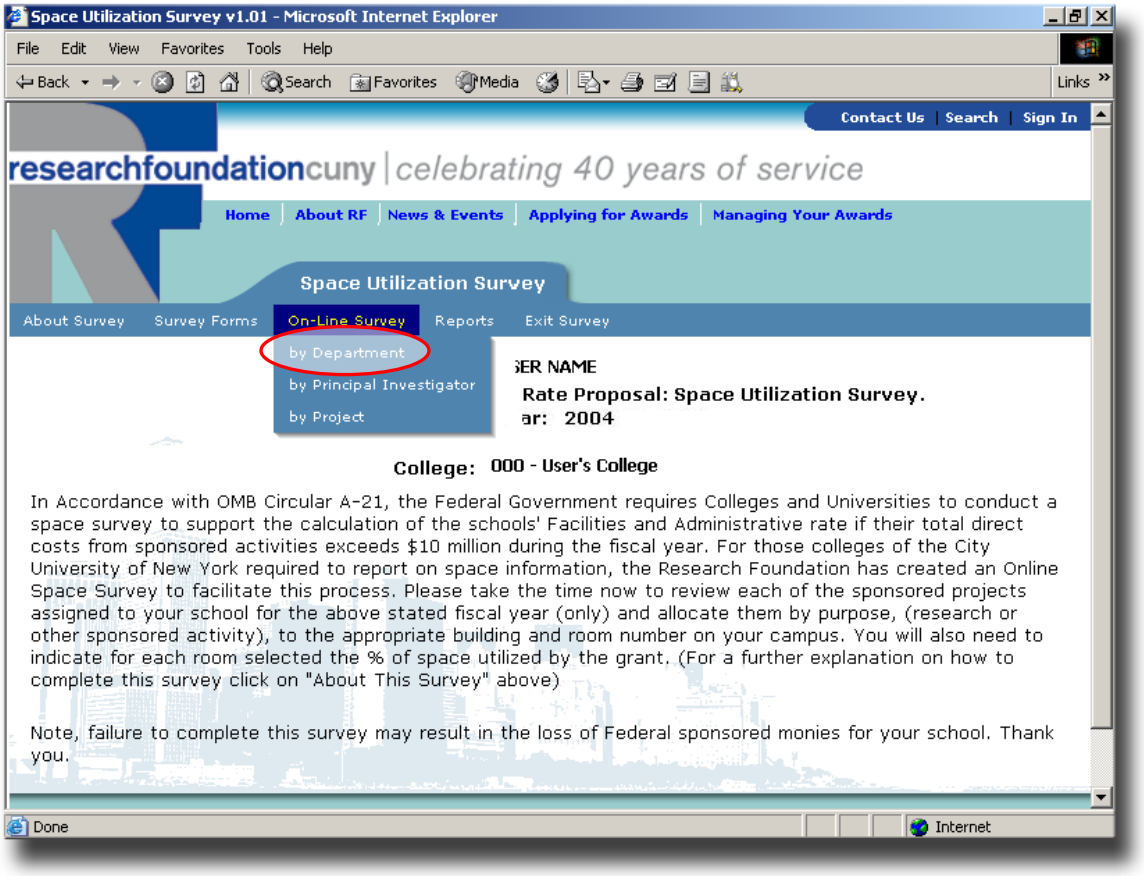
3) by Project – This option will list all the project's from your college in numerical order. Choose this option if you know the number of the project/s that you wish to enter space utilization information for.

4.2. Entering Space Information

The following section will walk you through the process of entering space utilization information in the system by using each of the options described above.

1) Using the "by Department" Option

(i) To enter information "by Department", select this option from the "On-Line Survey" menu (*see figure 7*).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About Survey | Survey Forms | On-Line Survey | Reports | Exit Survey
by Department
by Principal Investigator
by Project
ER NAME
Rate Proposal: Space Utilization Survey.
ar: 2004
College: 000 - User's College
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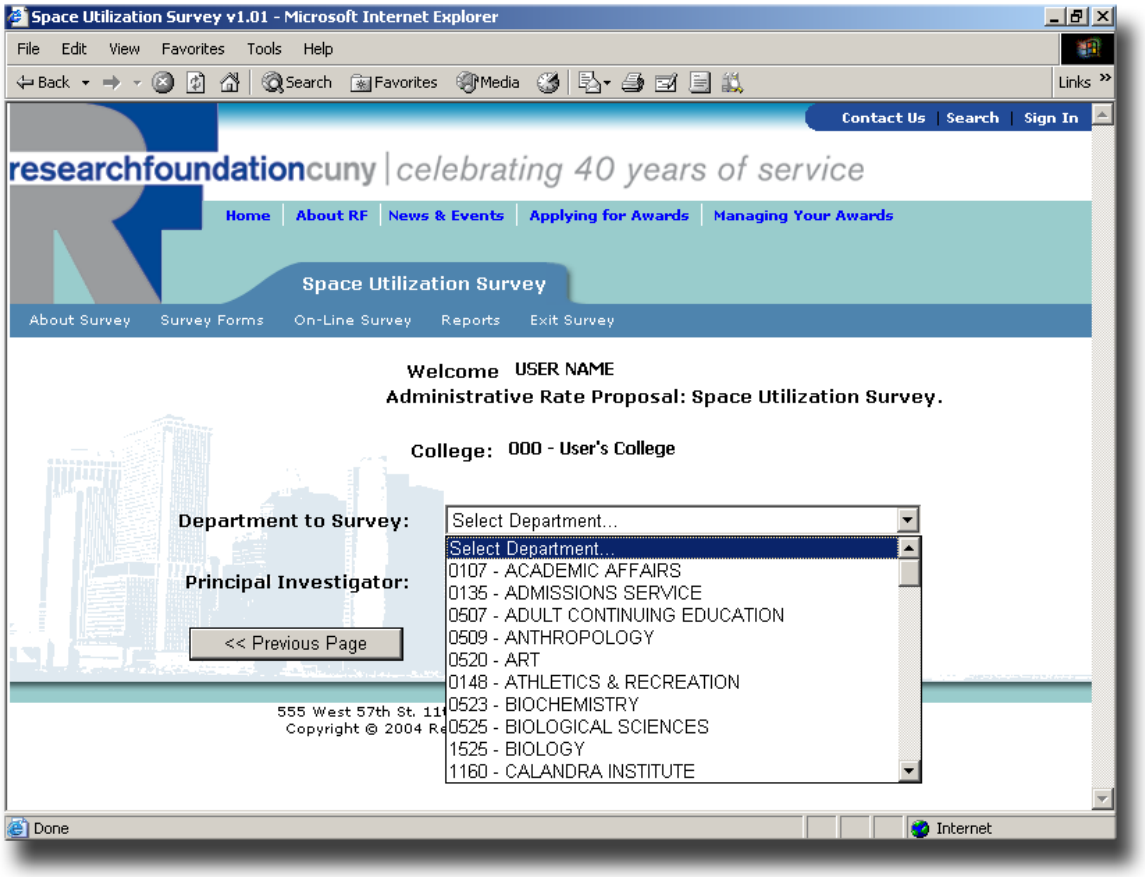
Note, failure to complete this survey may result in the loss of Federal sponsored monies for your school. Thank you.
Done
Internet

Figure 7

This will bring you to the "Department Selection" screen. From this screen, select the desired department (*see figure 8*).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Welcome USER NAME
Administrative Rate Proposal: Space Utilization Survey.
College: 000 - User's College
Department to Survey:
Principal Investigator:
<< Previous Page
Select Department...
Select Department...
0107 - ACADEMIC AFFAIRS
0135 - ADMISSIONS SERVICE
0507 - ADULT CONTINUING EDUCATION
0509 - ANTHROPOLOGY
0520 - ART
0148 - ATHLETICS & RECREATION
0523 - BIOCHEMISTRY
0525 - BIOLOGICAL SCIENCES
1525 - BIOLOGY
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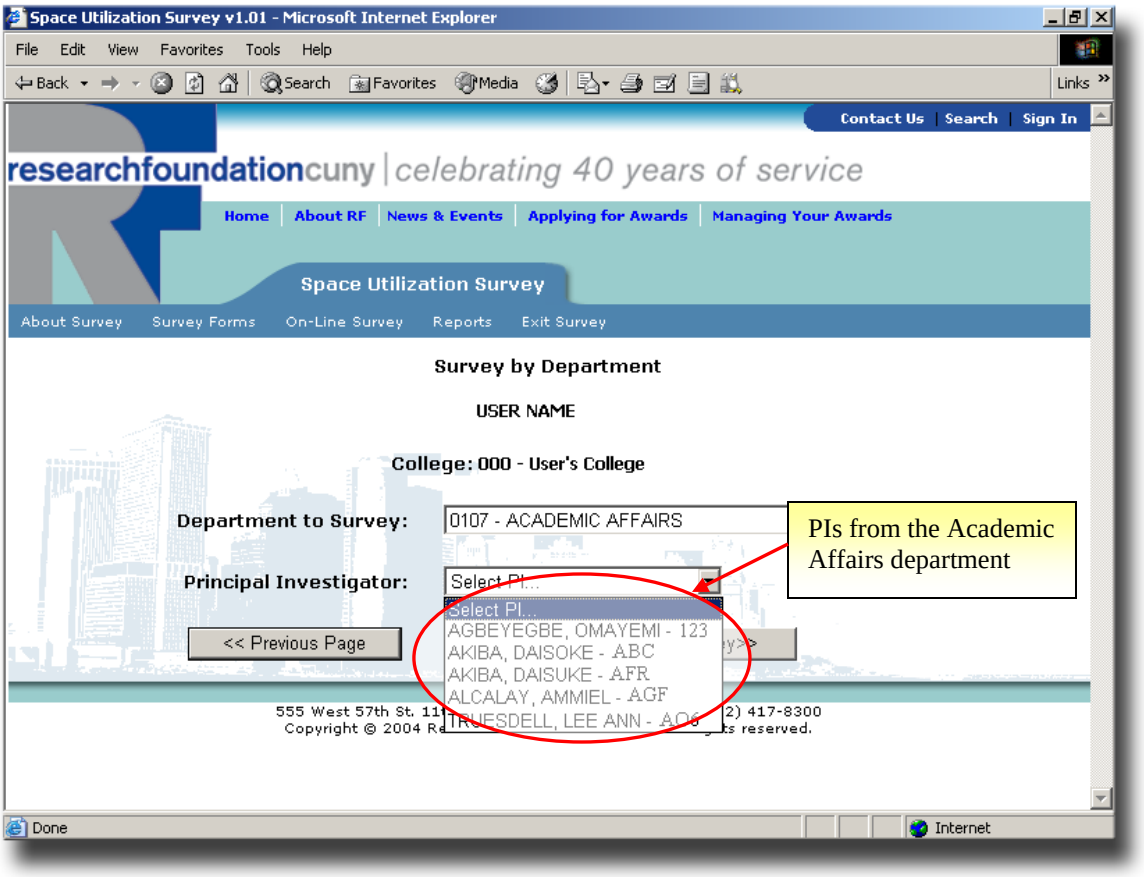
Done
Internet

Figure 8

(ii) Once you have done this, the system will automatically generate a list of PIs from the selected department in the "Principal Investigator" drop-down box. For example, if you selected "Academic Affairs" as a department to survey, the system will generate a list of all the PIs from Academic Affairs (*see figure 9*).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About Survey | Survey Forms | On-Line Survey | Reports | Exit Survey
Survey by Department
USER NAME
College: 000 - User's College
Department to Survey:
0107 - ACADEMIC AFFAIRS
Principal Investigator:
Select PI...
Select PI...
AGBEYEGBE, OMAYEMI - 123
AKIBA, DAISOKE - ABC
AKIBA, DAISUKE - AFR
ALCALAY, AMMIEL - AGF
<< Previous Page
PIs from the Academic Affairs department
Done
Internet

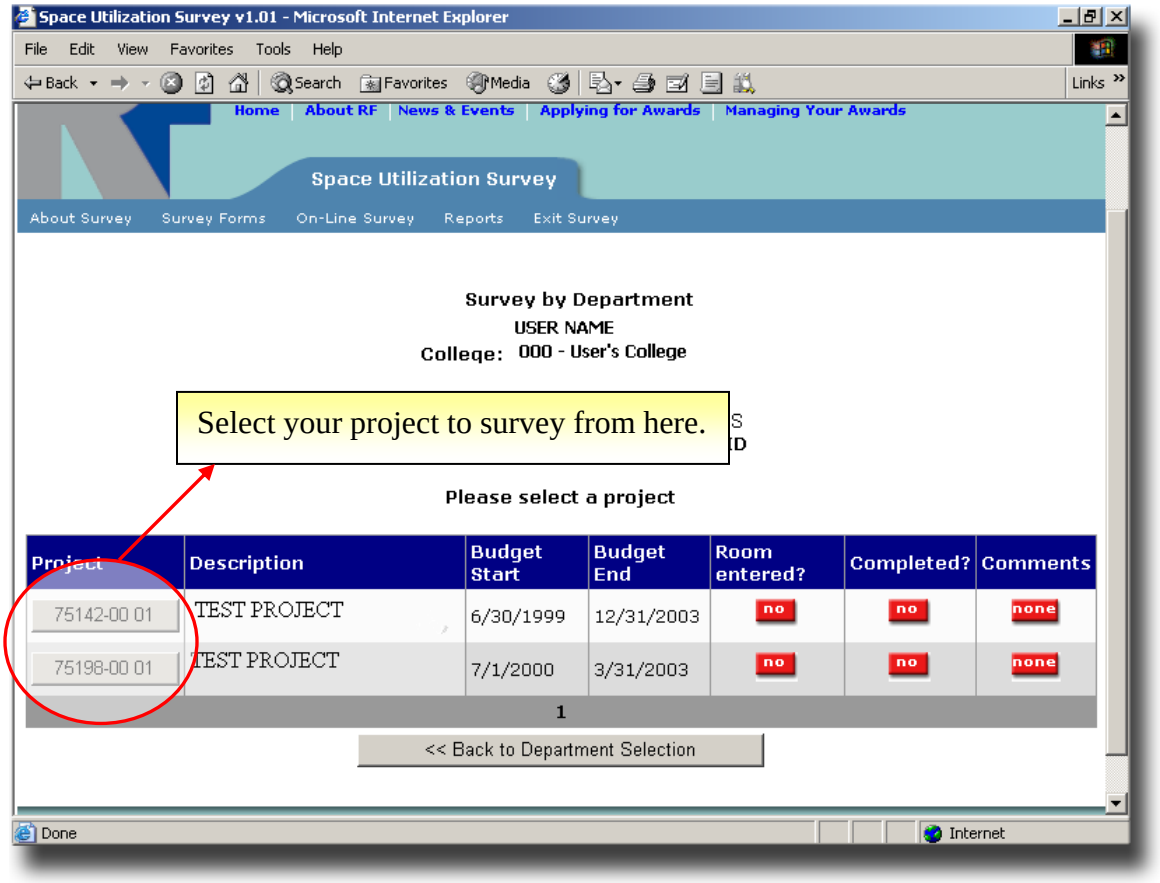
Figure 9

From this drop-down box, select the PI whose project you wish to submit survey information for and then click on the *"Continue Survey"* button.

(iii) This will bring you to the "Project Selection" screen, which will display all the projects for the PI you have chosen (*see figure 10*). Click on the project you would like to begin with.

Alternatively you can click on the *"Back to Department Selection"* button to pick another department.

Note: Regardless of which survey option you are currently using, you can switch gears at any time and choose to enter information via another option (e.g. "by Principal Investigator" or "by Project") by selecting the appropriate option from the "On-Line Survey" menu located in the upper left hand portion of the screen.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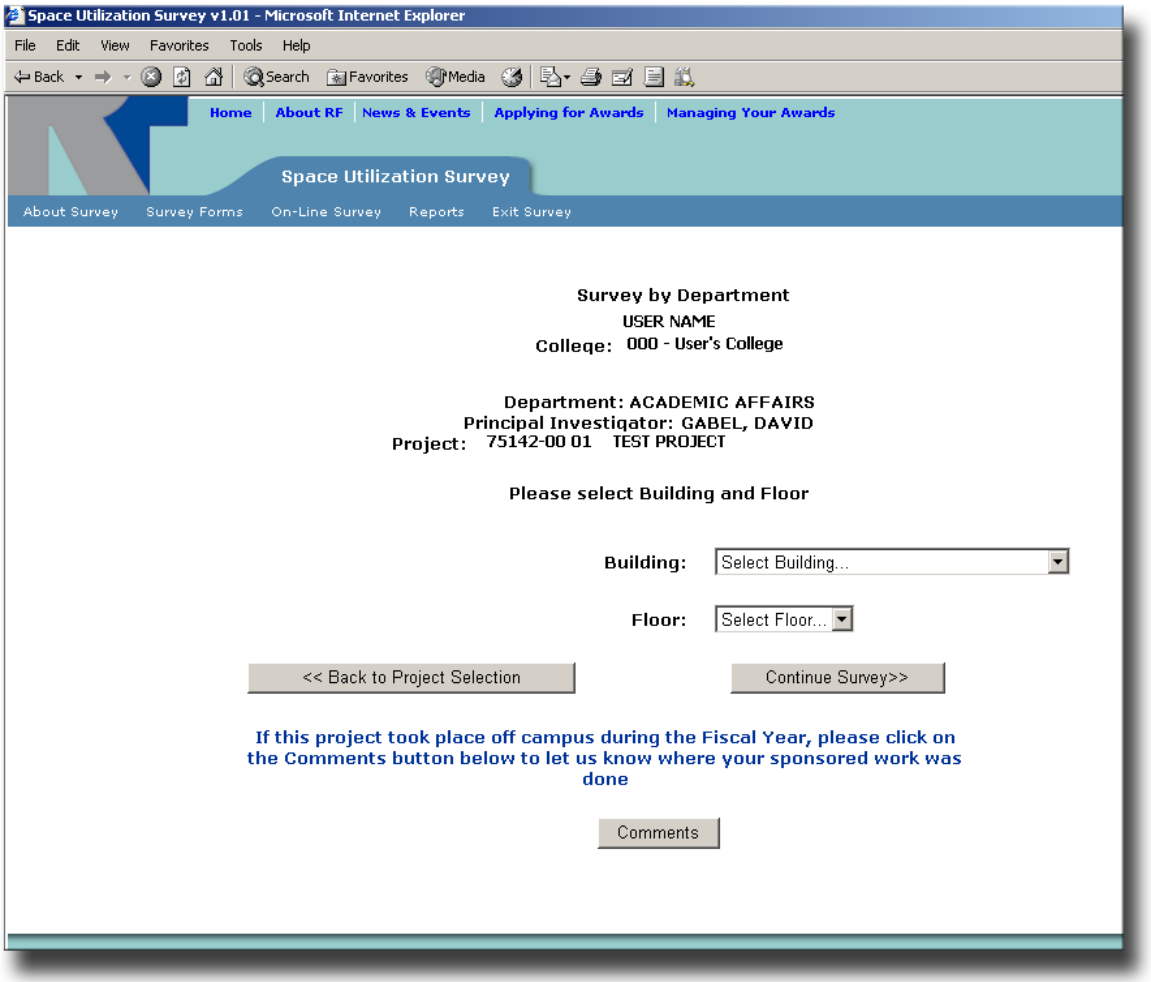
About Survey | Survey Forms | On-Line Survey | Reports | Exit Survey
Survey by Department
USER NAME
College: 000 - User's College
Select your project to survey from here.
Please select a project
Project | Description | Budget Start | Budget End | Room entered? | Completed? | Comments
75142-00 01 | TEST PROJECT | 6/30/1999 | 12/31/2003 | no | no | none
75198-00 01 | TEST PROJECT | 7/1/2000 | 3/31/2003 | no | no | none
1
<< Back to Department Selection
Done
Internet

Figure 10

The "Project Selection" screen not only provides you with the name of the sponsored projects of the PI that you had selected, but it also tells you if you have previously entered and/or completed space information, or attached any comments for any of the projects listed (*see figure 10*).

(iv) Once you have selected a project, you will be directed to the "Buildings and Floor Selection" screen (*see figure 11*).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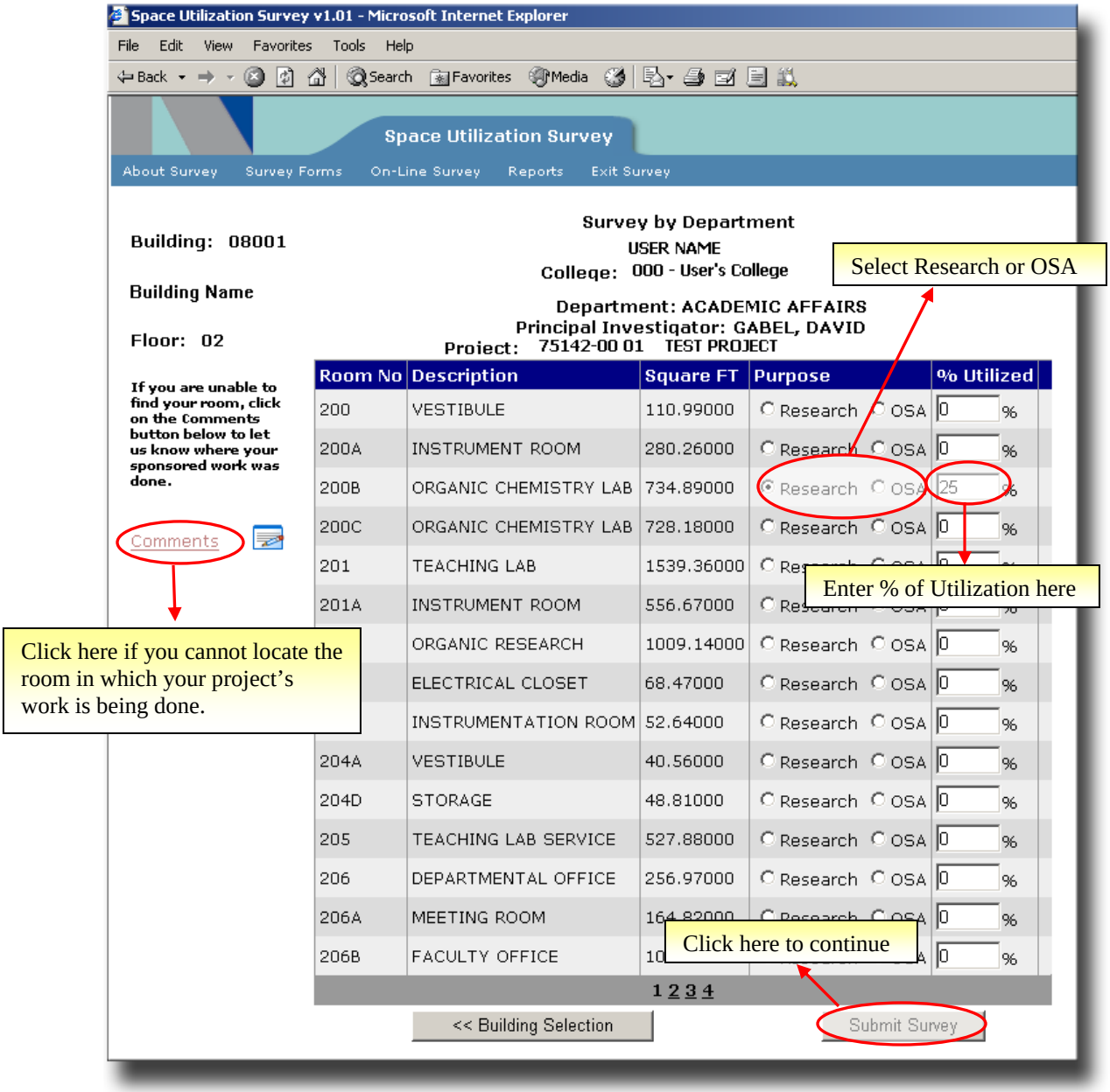
About Survey Survey Forms On-Line Survey Reports Exit Survey
Survey by Department
USER NAME
College: 000 - User's College
Department: ACADEMIC AFFAIRS
Principal Investigator: GABEL, DAVID
Project: 75142-00 01 TEST PROJECT
Please select Building and Floor
Building: Select Building...
Floor: Select Floor...
<< Back to Project Selection
Continue Survey>>
If this project took place off campus during the Fiscal Year, please click on the Comments button below to let us know where your sponsored work was done
Comments

Figure 11

From this screen, select the building and then floor where the project's work took place. Click the "*Continue Survey*" button to proceed. You will then be directed to a "Room Selection" screen (*see figure 12*) where you can select the room in which the project's work took place.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Space Utilization Survey
About Survey Survey Forms On-Line Survey Reports Exit Survey
Building: 08001
Building Name
Floor: 02
If you are unable to find your room, click on the Comments button below to let us know where your sponsored work was done.
Comments
Survey by Department
USER NAME
College: 000 - User's College
Department: ACADEMIC AFFAIRS
Principal Investigator: GABEL, DAVID
Project: 75142-00 01 TEST PROJECT
Room No | Description | Square FT | Purpose | % Utilized
200 VESTIBULE 110.99000 Research OSA 0 %
200A INSTRUMENT ROOM 280.26000 Research OSA 0 %
200B ORGANIC CHEMISTRY LAB 734.89000 Research OSA 25 %
200C ORGANIC CHEMISTRY LAB 728.18000 Research OSA 0 %
201 TEACHING LAB 1539.36000
201A INSTRUMENT ROOM 556.67000
ORGANIC RESEARCH 1009.14000 Research OSA 0 %
ELECTRICAL CLOSET 68.47000 Research OSA 0 %
INSTRUMENTATION ROOM 52.64000 Research OSA 0 %
204A VESTIBULE 40.56000 Research OSA 0 %
204D STORAGE 48.81000 Research OSA 0 %
205 TEACHING LAB SERVICE 527.88000 Research OSA 0 %
206 DEPARTMENTAL OFFICE 256.97000 Research OSA 0 %
206A MEETING ROOM Research OSA 0 %
206B FACULTY OFFICE 0 %
1 2 3 4
<< Building Selection
Submit Survey
Select Research or OSA
Enter % of Utilization here
Click here if you cannot locate the room in which your project's work is being done.
Click here to continue

Figure 12

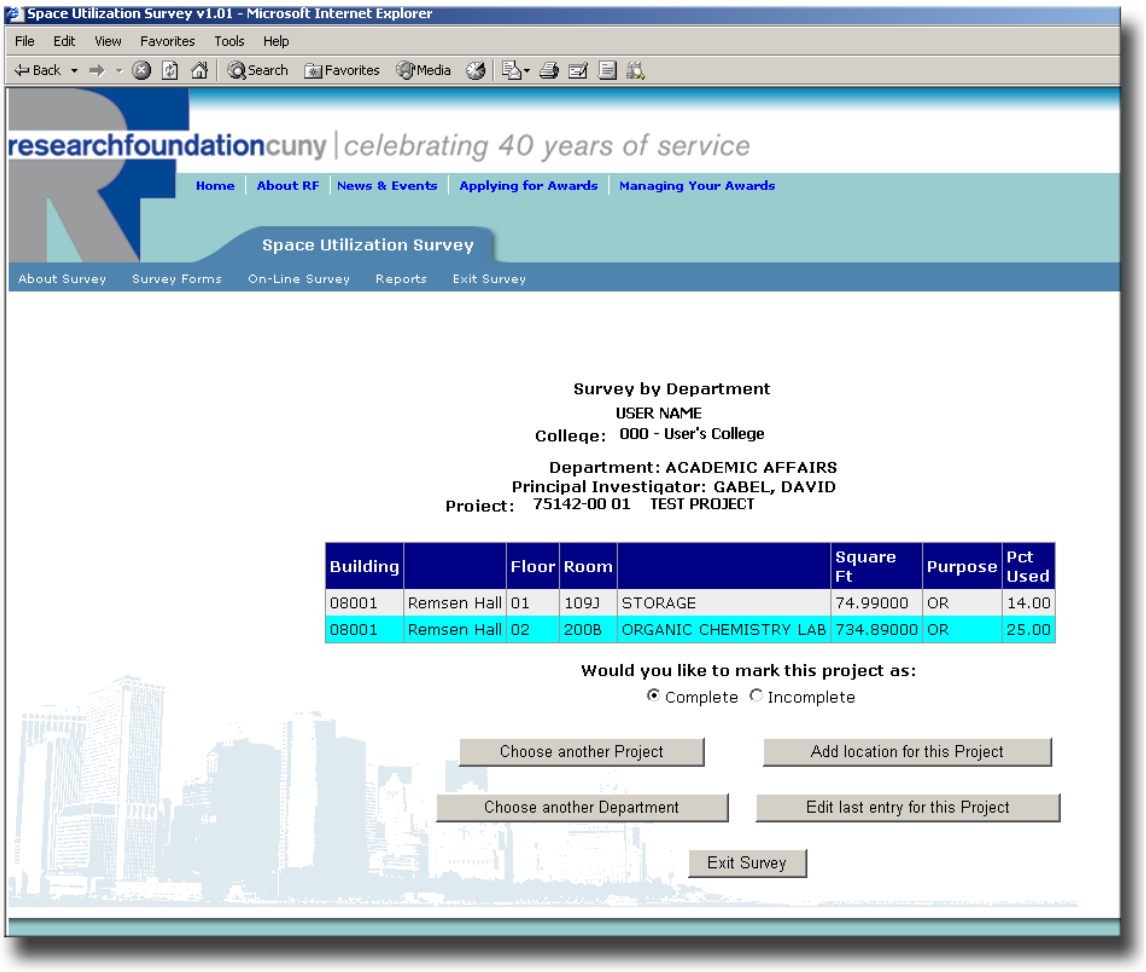
From the "Room Selection" screen select the room in which your project's work took place and then indicate if this work was "Research" or "OSA" by clicking on the appropriate radio button. Enter the percentage (%) of space utilization and click on the "*Submit Survey*" button located at the bottom of the screen.

If you cannot locate the room in which your project's work is being done, click on the "*Comments*" button and give us as much information as

possible about where the work took place (i.e. room number, floor, indicate Research of OSA, percentage of utilization, etc…).

Note: Please be advised that the system will not accept a room where no Percentage of Utilization has been entered. If you want to tag a project to a certain space initially and come back later to complete it, enter 1%. You will be able to tell all the projects tagged to 1% by selecting the "Research & OSA Space Utilization Report" from the "Reports" menu located in the upper left hand portion of the screen. (See page 26 for more information about Reports.)

(v) Finally, click the "Submit Survey" button and you will be directed to a "Summary" screen which will display all the rooms entered for the project to date. The last item you entered will be highlighted in blue (*see figure 13*).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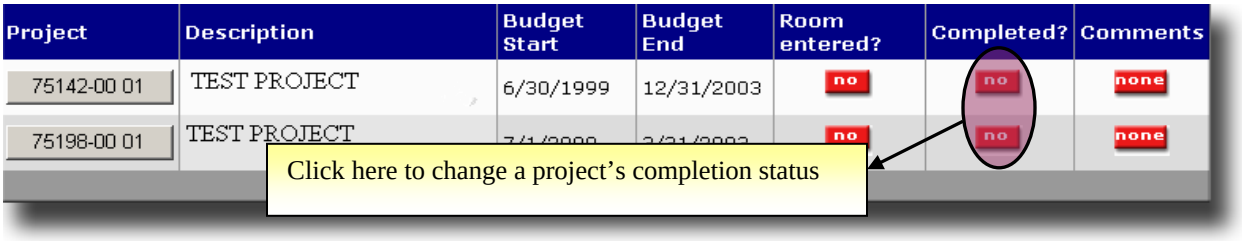
About Survey Survey Forms On-Line Survey Reports Exit Survey
Survey by Department
USER NAME
College: 000 - User's College
Department: ACADEMIC AFFAIRS
Principal Investigator: GABEL, DAVID
Project: 75142-00 01 TEST PROJECT
Building | Floor | Room | Square Ft | Purpose | Pct Used
08001 | Remsen Hall | 01 | 109J | STORAGE | 74.99000 | OR | 14.00
08001 | Remsen Hall | 02 | 200B | ORGANIC CHEMISTRY LAB | 734.89000 | OR | 25.00
Would you like to mark this project as:
Complete Incomplete
Choose another Project
Add location for this Project
Choose another Department
Edit last entry for this Project
Exit Survey

See Figure 13

From this "Summary" screen, you may choose to mark the current project as either "Complete" or "Incomplete" by selecting the appropriate radio-button.

Note: Even when a project is tagged complete, you may still go back later and edit it Also, you may change the status of a project from "incomplete" to "complete" or visa versa by simply clicking on the "*yes*" or "*no*" button on the "Project Summary" screen (*see figure 14*).



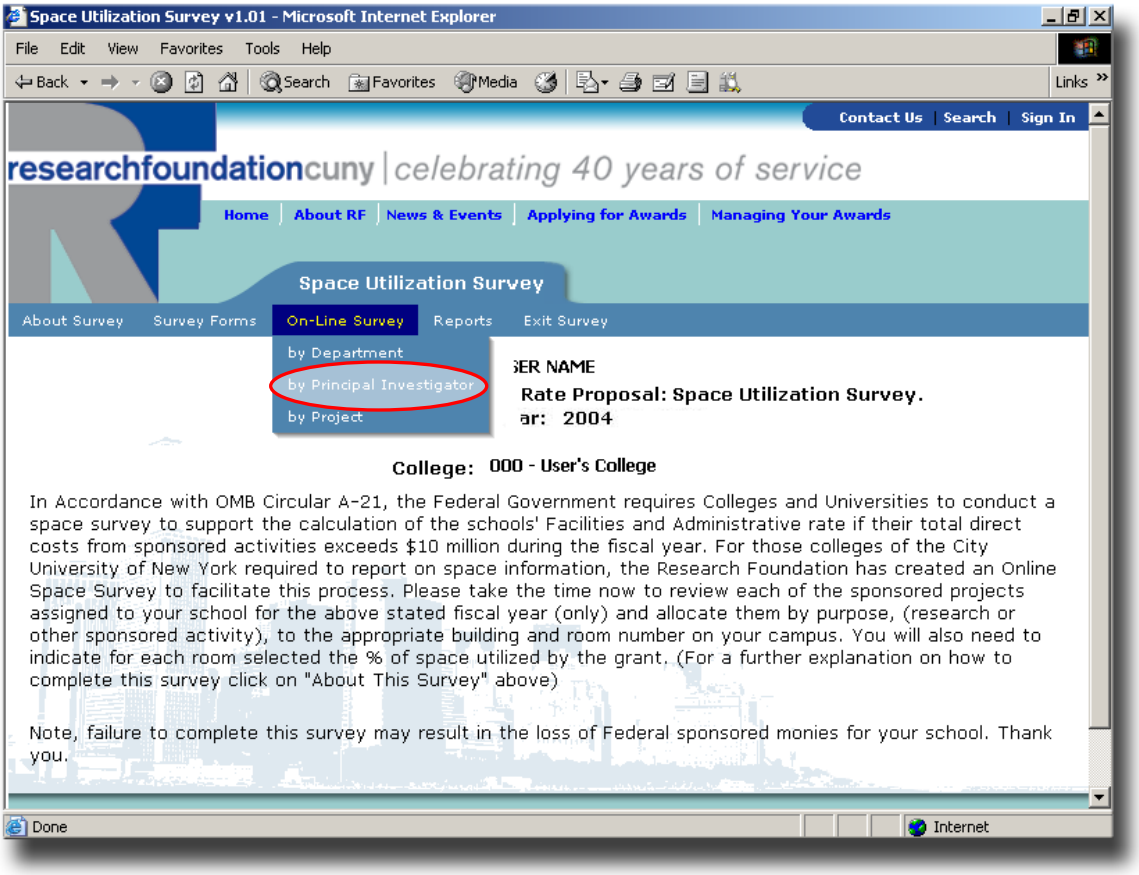
See Figure 14

Once you have selected a completion status of your project, you can choose one of the following options:

- Choose Another Project: This option returns you to the current PI's "Project Selection" screen to enter information for another project.
- Choose Another Department: This option brings you back to the "Department Selection" screen.
- Add a Location for this Project: This option brings you back to the "Building and Room Selection" screen to enable you to add another room to the current project.
- Edit Last Entry: This option brings you back to the point of your last entry so that you can modify or change your entry.
- Exit Survey: This option brings you to a screen that will remind you of the open projects for this PI. Click "*Done With Survey*" to exit the system.

2) Using the "by Principal Investigator" option:

Select this option from the "On-line Survey" menu (*see figure 15*).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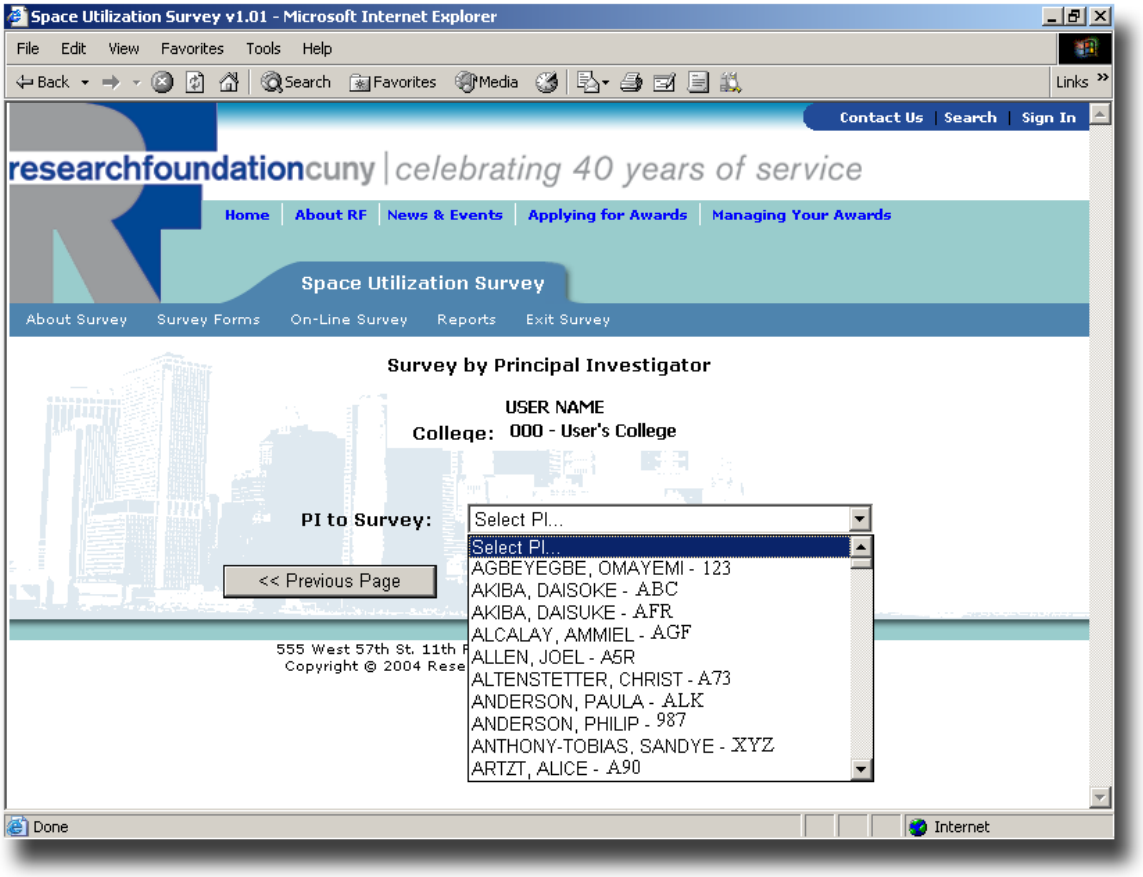
About Survey | Survey Forms | On-Line Survey | Reports | Exit Survey
by Department
by Principal Investigator
by Project
ER NAME
Rate Proposal: Space Utilization Survey.
ar: 2004
College: 000 - User's College
In Accordance with OMB Circular A-21, the Federal Government requires Colleges and Universities to conduct a space survey to support the calculation of the schools' Facilities and Administrative rate if their total direct costs from sponsored activities exceeds $10 million during the fiscal year. For those colleges of the City University of New York required to report on space information, the Research Foundation has created an Online Space Survey to facilitate this process. Please take the time now to review each of the sponsored projects assigned to your school for the above stated fiscal year (only) and allocate them by purpose, (research or other sponsored activity), to the appropriate building and room number on your campus. You will also need to indicate for each room selected the % of space utilized by the grant. (For a further explanation on how to complete this survey click on "About This Survey" above)
Note, failure to complete this survey may result in the loss of Federal sponsored monies for your school. Thank you.
Done
Internet

Figure 15

This will direct you to the "PI Selection" screen (*see figure 16*) from which you may select the appropriate PI from the drop-down menu and then click on the "*Continue Survey*" button.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Survey by Principal Investigator
USER NAME
College: 000 - User's College
PI to Survey:
Select PI...
Select PI...
AGBEYEGBE, OMAYEMI - 123
AKIBA, DAISOKE - ABC
AKIBA, DAISUKE - AFR
ALCALAY, AMMIEL - AGF
ALLEN, JOEL - A5R
ALTENSTETTER, CHRIST - A73
ANDERSON, PAULA - ALK
ANDERSON, PHILIP - 987
ANTHONY-TOBIAS, SANDYE - XYZ
ARTZT, ALICE - A90
<< Previous Page
555 West 57th St. 11th F
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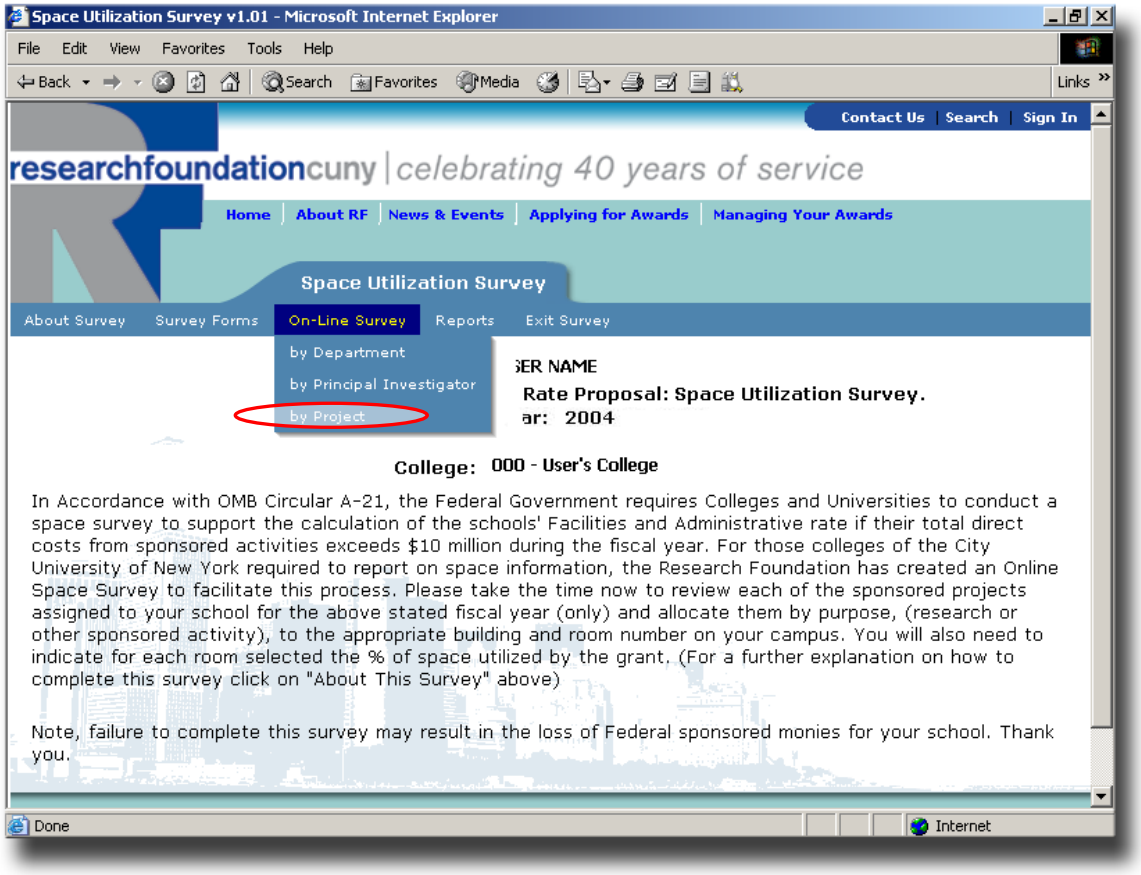
Done
Internet

Figure 16

Follow the steps (i) through (v.) in *Section 4.2. (1)* above.

3) Using the "by Project" Option:

To input information "by Project", select this option from the "On-Line Survey" menu (*see figure 17*).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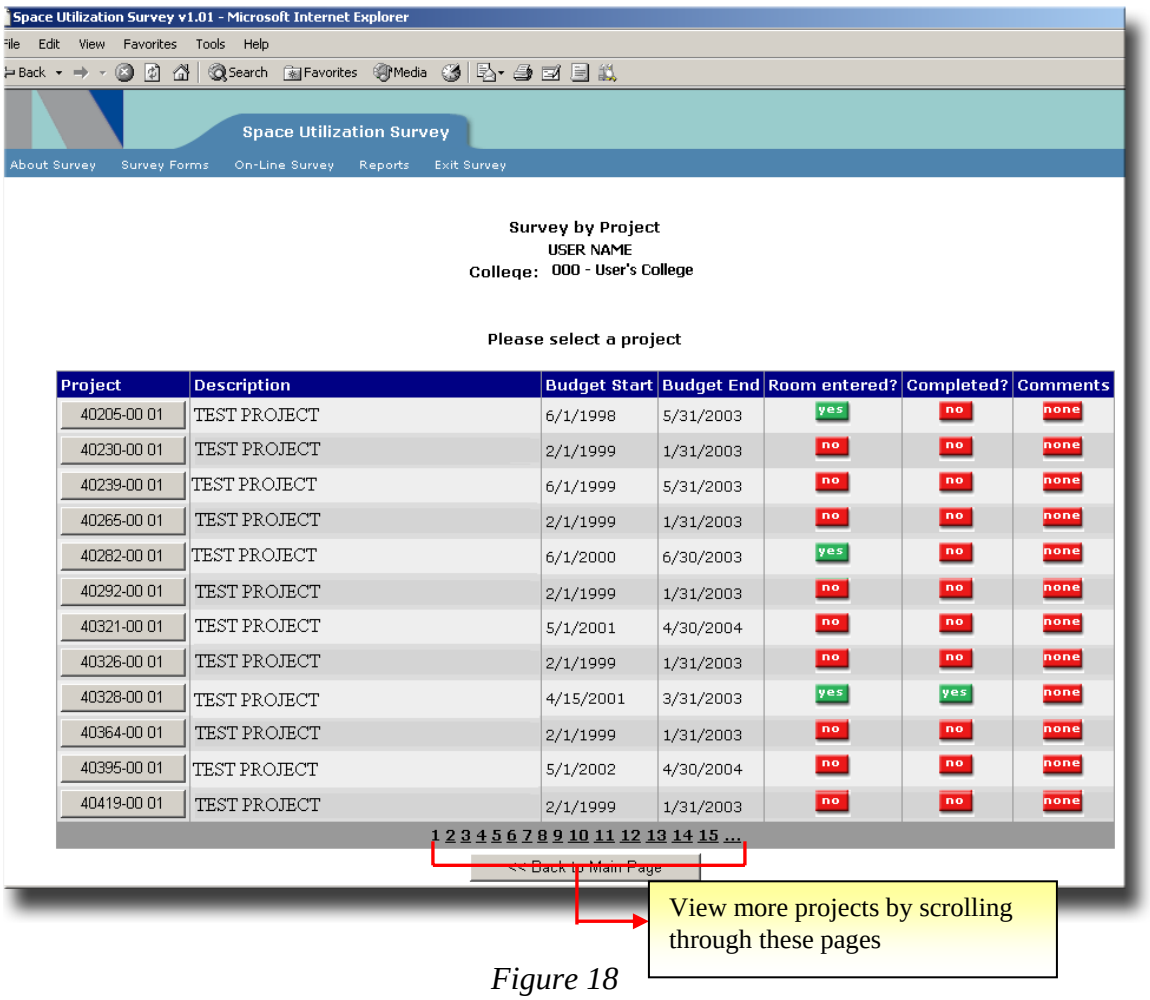
by Project
ER NAME
Rate Proposal: Space Utilization Survey.
ar: 2004
College: 000 - User's College
In Accordance with OMB Circular A-21, the Federal Government requires Colleges and Universities to conduct a space survey to support the calculation of the schools' Facilities and Administrative rate if their total direct costs from sponsored activities exceeds $10 million during the fiscal year. For those colleges of the City University of New York required to report on space information, the Research Foundation has created an Online Space Survey to facilitate this process. Please take the time now to review each of the sponsored projects assigned to your school for the above stated fiscal year (only) and allocate them by purpose, (research or other sponsored activity), to the appropriate building and room number on your campus. You will also need to indicate for each room selected the % of space utilized by the grant. (For a further explanation on how to complete this survey click on "About This Survey" above)
Note, failure to complete this survey may result in the loss of Federal sponsored monies for your school. Thank you.
Done
Internet

Figure 17

This will direct you to the "Project Selection" screen (*see figure 18*), where all your college's projects will be listed in numerical order. Select the appropriate project from here and then click on the "*Continue Survey*" button.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Space Utilization Survey
About Survey Survey Forms On-Line Survey Reports Exit Survey
Survey by Project
USER NAME
College: 000 - User's College
Please select a project
Project Description Budget Start Budget End Room entered? Completed? Comments
40205-00 01 TEST PROJECT 6/1/1998 5/31/2003 yes no none
40230-00 01 TEST PROJECT 2/1/1999 1/31/2003 no no none
40239-00 01 TEST PROJECT 6/1/1999 5/31/2003 no no none
40265-00 01 TEST PROJECT 2/1/1999 1/31/2003 no no none
40282-00 01 TEST PROJECT 6/1/2000 6/30/2003 yes no none
40292-00 01 TEST PROJECT 2/1/1999 1/31/2003 no no none
40321-00 01 TEST PROJECT 5/1/2001 4/30/2004 no no none
40326-00 01 TEST PROJECT 2/1/1999 1/31/2003 no no none
40328-00 01 TEST PROJECT 4/15/2001 3/31/2003 yes yes none
40364-00 01 TEST PROJECT 2/1/1999 1/31/2003 no no none
40395-00 01 TEST PROJECT 5/1/2002 4/30/2004 no no none
40419-00 01 TEST PROJECT 2/1/1999 1/31/2003 no no none
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 ...
<< Back to Main Page
View more projects by scrolling through these pages

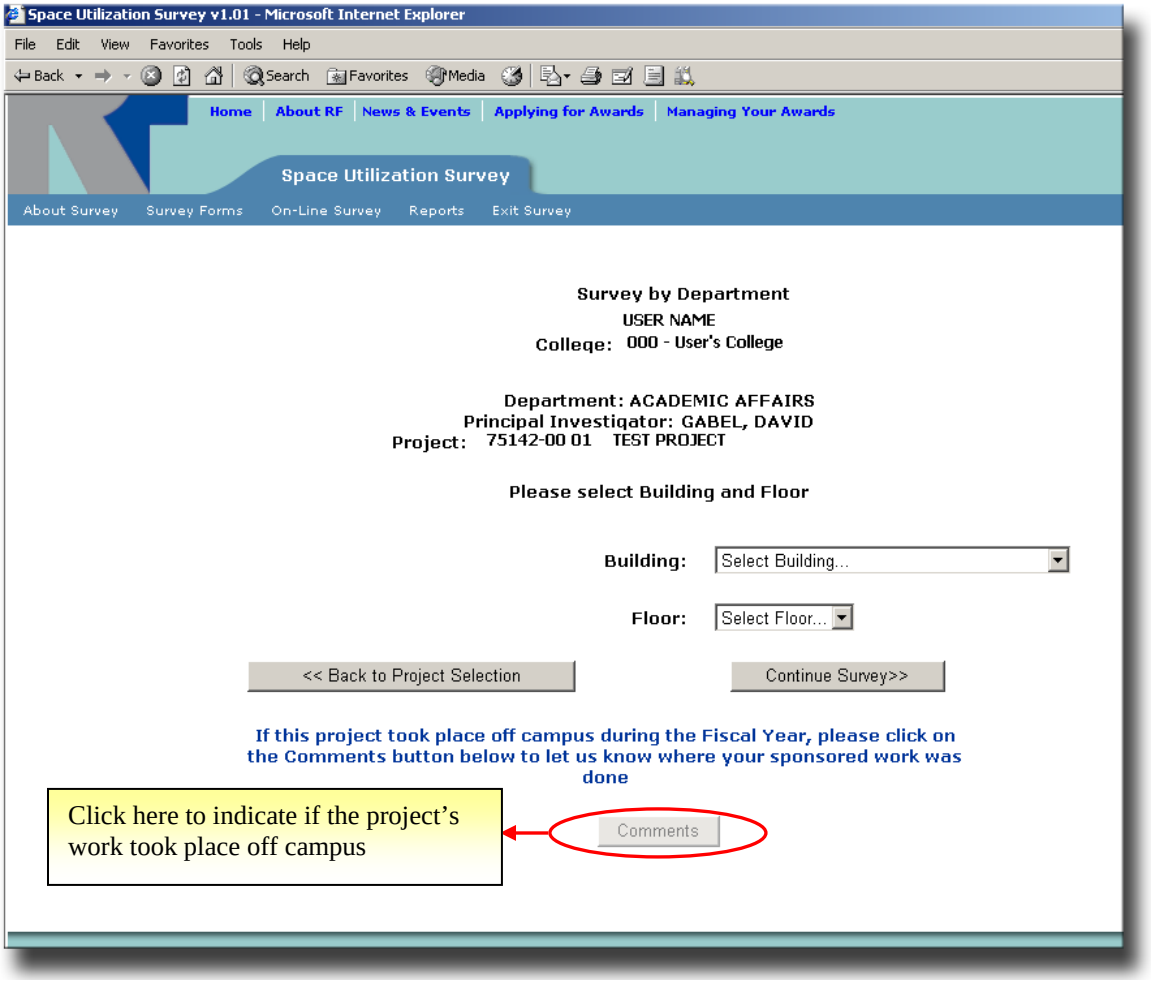
Figure 18

Follow the steps (i) through (v.) in *Section 4.2. (1)* above.

SECTION 5. Off Campus Information

5.1. Comments

We need to keep track of all Research and OSA project work, even if it is being done off campus. To submit off campus information, after selecting the project via one of the On-Line Survey methods, simply click on the "Comments Button" located on the bottom of you screen (*see figure 19*) and type in the words "Off Campus" in the system generated "Comments Window" (*see Figure 20*). If the work took place at another CUNY campus, this information should also be included in the box.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Survey by Department
USER NAME
College: 000 - User's College
Department: ACADEMIC AFFAIRS
Principal Investigator: GABEL, DAVID
Project: 75142-00 01 TEST PROJECT
Please select Building and Floor
Building: Select Building...
Floor: Select Floor...
<< Back to Project Selection
Continue Survey>>
If this project took place off campus during the Fiscal Year, please click on the Comments button below to let us know where your sponsored work was done
Comments
Click here to indicate if the project's work took place off campus

Figure 19

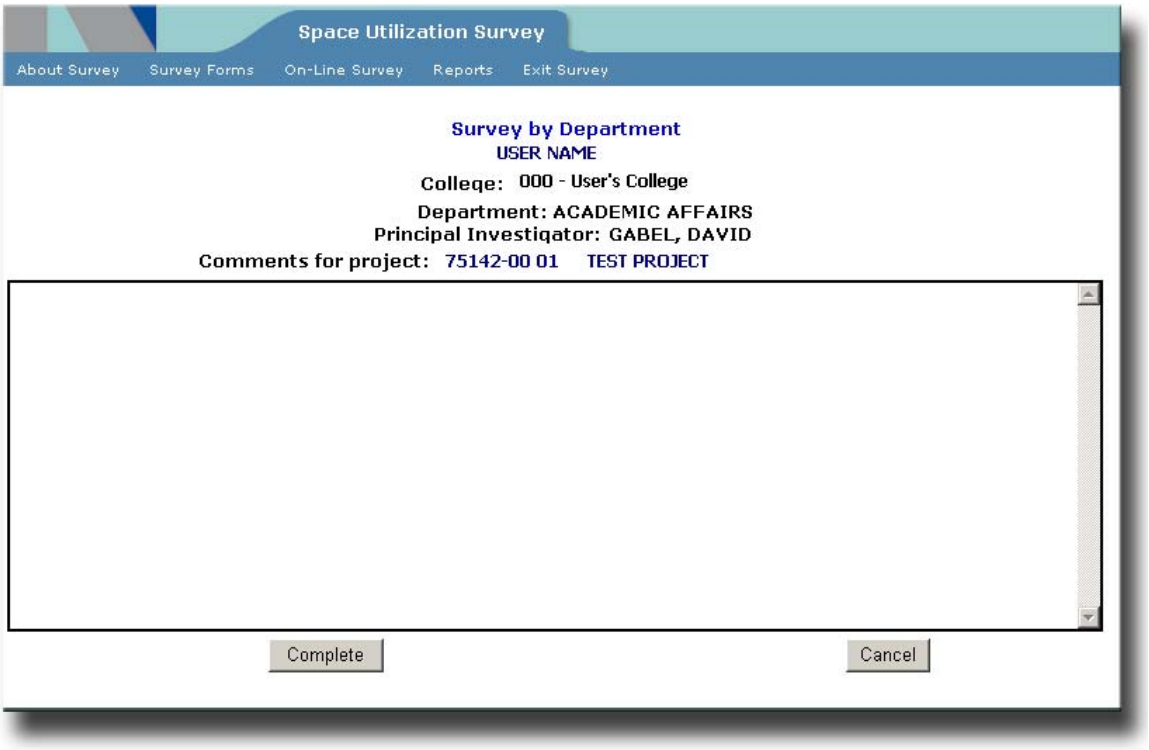


Figure 20

Click on "*Complete*" to save your comment to your project and tag it complete.

Alternately you can click on "*Cancel*" to return to the "Buildings and Floor Selection" screen.

SECTION 6. REPORTS

6.1. Report Options

There are several reports to help you manage and analyze the information you have entered into the On-Line Space Utilization System. You may choose one or more of the following at anytime to aid you in the process of ensuring that the space used to carry out Sponsored Activity at your school is properly reflected in the online system. Simply select from the "Reports" menu one of the following:

1) Incomplete Survey – lists all projects (by department and PI) that have for which space information has not been entered or which have not been tagged as "complete".

2) OSA Space Utilization - lists all projects (by department and PI) been charged to Other Sponsored Activity. Included in the report are Building, Room and Space Utilization % information.

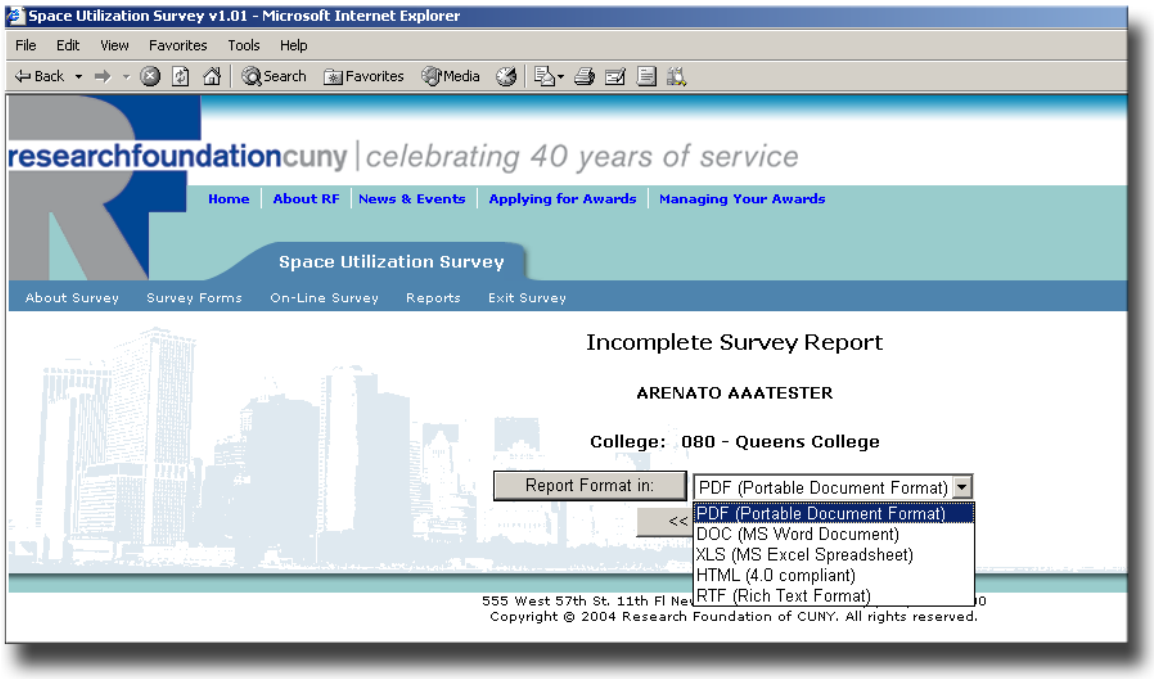
3) Research Space Utilization - lists all projects (by department and PI) that have been charged to Research. Building, Room and Space Utilization % information are also given here.

4) Research and OSA Space Utilization - lists all projects (by department and PI) that have been charged to Research and/or Other Sponsored Activity. Building, Room and Space Utilization % information are also displayed here.

5) Rooms Exception – lists all the rooms at a campus that have been allocated more than 100% use. The system automatically redistributes percentages between the projects that have been using these rooms so that the total usage for these rooms by all projects does not exceed 100%. The report shows the original utilization charges and the recalculated amounts (done by the system).

6.2. Printing Reports

To print a particular report, select it from the "Reports" menu. This action will direct you to a screen from which you may choose a print format (*see figure 21*).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Incomplete Survey Report
ARENATO AAATESTER
College: 080 - Queens College
Report Format in:
PDF (Portable Document Format)
PDF (Portable Document Format)
DOC (MS Word Document)
XLS (MS Excel Spreadsheet)
HTML (4.0 compliant)
RTF (Rich Text Format)
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Figure 21

Note: The system automatically defaults to the PDF format if you do not select another option from the drop-down menu.

Once you have made your printing format selection, click on the "*Report Format in*" button to generate your report.

After your report has been generated, you have the option of either printing out your report or saving it to your local computer. *Figure 22*, shows how you can do this with a report generated in PDF.

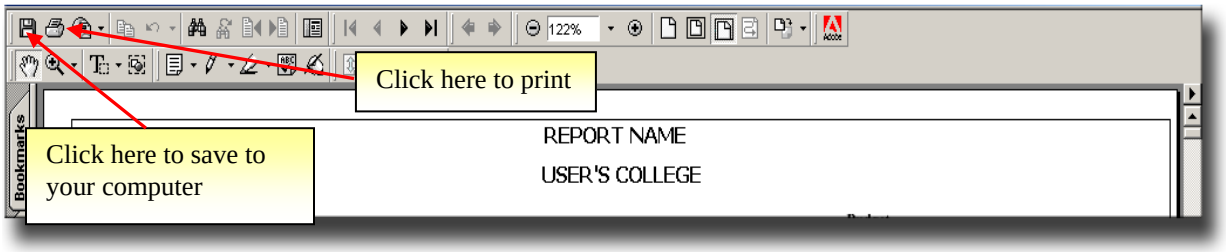

Figure 22